



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

## Second Account and Report of Successor Trustee and Petition for Allowance of Trustee Fees and Attorney Fees

		<p><b>MARK OLSEN</b>, private professional fiduciary, is petitioner.</p> <p>Please see petition for details.</p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
			<b><u>Continued to 2/18/15</u> at the request of the attorney.</b>	
			1. Beginning property on hand in this, the 2 <sup>nd</sup> account is \$335,240.14. The ending property on hand in the first account was \$324,340.99 a difference of \$10,900.15. The beginning property on hand for the 2nd account must be the same as the ending property on hand in the first account. Need amended accounting.	
			2. Attorney fees includes \$120 for communications with the Probate Examiner (identified as court investigator in the declaration). Local Rule 7.17B considers communication with the Probate Examiner to be a normal cost of doing business and is therefore not reimbursable.	
			3. Disbursement schedule shows payments totaling \$655.00 to Grey Roberts for professional services. Need more information on what professional services where provided.	
			4. Disbursement Schedule shows legal fees totaling \$6,223.26. Order approving the First Account allowed attorney fees totaling \$4,962.50. A difference of \$1,260.76. Need clarification.	
			<b>Please see additional page.</b>	
<b>Cont. from 121814</b>			<b>Reviewed by: KT</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			<b>Reviewed on: 12/15/14</b>
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**NEEDS/PROBLEMS/COMMENTS (cont.):**

5. Disbursement schedule identifies several disbursements (totaling \$6,000.08) as "- split- -" Probate Code §1062(b) requires the disbursement schedule to include the nature and purpose of each item, the name of the payee and the date thereof. Need clarification.
6. Disbursement schedule shows a payment of \$507.40 on 10/25/12 without identifying what the purchase was for. Need clarification.
7. Order does not comply with Local Rule 7.6.1C. All orders settling accounts shall contain a statement as to the balance of the estate on hand, specifically noting the amount of cash included in the balance.

**Note:** If the petition is granted, status hearings will be set as follows:

- **Wednesday, September 28, 2016** at 9:00 a.m. in Department 303, for the filing of the third account.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

**2A Glenda Humphries (CONS/P)**  
 Atty Frame, Darline (Pro Per – Sister – Petitioner)  
 Atty Romanenko, Carolyn (Pro Per – Sister – Petitioner)  
 Atty White, Aline (Pro Per – Sister – Petitioner)

**Case No. 0279066**

**Petition for Appointment successor Probate Conservator of the Person**

	See petition for details.	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u>Note:</u> TONY DEWAYNE MARSH, Nephew, filed a petition on 10-31-14 for appointment as Joint Successor Conservator of the Person with current conservator <b>MAXINE MARSH</b>. See Page B.</p> <p><u>Note:</u> Attorney Nancy LeVan appeared on behalf of Petitioners at the 12-17-14 hearing on the competing petition; however, no Substitution has been filed.</p> <ol style="list-style-type: none"> <li>1. There is no vacancy in the office of Conservator. Maxine Marsh was appointed as Successor Conservator of the person on 7-15-03 and there is no petition pending to remove her pursuant to Probate Code §2650. (Tony Dewayne Marsh is seeking appointment jointly with the existing conservator.)</li> <li>2. Petitioners do not request conservatorship of the estate, but seek powers under Probate Code §2590 in order to seek public assistance benefits and resources for the Conservatee. Pursuant to Local Rule 7.15.4, Conservatorship of the estate is not required when the only income/assets are public assistance benefits. As such, it does not appear that powers under §2590 are necessary or appropriate. The Court may require clarification.</li> <li>3. Need video receipt per Local Rule 7.15.8.A.</li> <li>4. The Conservatee is developmentally disabled pursuant to Probate Code §1420. Therefore, need notice to CVRC pursuant to Probate Code §§ 1822(e), 1461.4.</li> </ol>																																																																								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="3"><b>Cont from 121514</b></td> </tr> <tr> <td style="width: 5%;"></td> <td style="width: 85%;">Aff.Sub.Wit.</td> <td style="width: 10%;"></td> </tr> <tr> <td>✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td>✓</td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td>✓</td> <td>Aff.Mail</td> <td>W</td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td>✓</td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td>✓</td> <td>Letters</td> <td></td> </tr> <tr> <td>✓</td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td>X</td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td>✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>			<b>Cont from 121514</b>				Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail	W		Aff.Pub.			Sp.Ntc.			Pers.Serv.		✓	Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt	X		CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice	
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**2A**

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
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	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc Reviewed on: 1-27-15 Updates: Recommendation: File 2B - Humphries		

**2B**

Atty Perez, Holley H., of Perez, Williams, Medina &amp; Rodriguez (for Petitioner Susan K. Medina)

(1) First and Final Report of Executor, (2) Waiver of Accounting and (3) Petition for Distribution

<b>DOD: 2/25/2011</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <p style="text-align: center;"><b>OFF CALENDAR</b></p> <p>First Amended First and Final Report of Executor, Waiver of Accounting and Petition for Distribution was filed 1/16/2015, and is set for hearing on <u>2/25/2015</u>.</p>
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		<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 1/28/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 3 - Medina</b>

**Atty Hinshaw, Caroline K. (for Mark Reiff – Executor – Petitioner)**

## Petition for Instructions

DOD: 3-29-13	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.		
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Video Receipt		
CI Report		
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✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 1-28-15
		Updates:
		Recommendation:
		File 4 - Carlson

DOD: 10-7-12		<b>JOAN ST. LOUIS</b> , Spouse, filed Petition for Assumption of Law Practice of David St. Louis on 9-6-13.  <p style="text-align: center;"><b>See file for details.</b></p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> First Account of Iolfa Trust Funds by Court-Appointed Practice Administrator and Status Report filed 10-30-14 is Page B.  This Status Hearing remains on calendar as it was continued by the Court.
Cont. from 111313, 112013, 010814, 022614, 052814, 062514, 092214, 110314, 121614			
Aff.Sub.Wit.			
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Letters			
Duties/Supp			
Objections			
Video Receipt			
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Aff. Posting			
Status Rpt			
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Citation			
FTB Notice			
		Reviewed by: skc Reviewed on: 1-27-15 Updates: Recommendation: File 5A – St. Louis	



## First Account of Iolfa Trust Funds by Court-Appointed Practice Administrator and Status Report

DOD: 10-7-12		See file for details.	NEEDS/PROBLEMS/COMMENTS:
Cont from 121614			
	Aff.Sub.Wit.		
✓	Verified		
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	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 1-27-15	
		Updates:	
		Recommendation:	
		File 5C – St. Louis	

**(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Statutory Commissions**

<b>DOD: 2-15-14</b>		<b>JOAN E. NAKAMURA</b> , Administrator with Full IAEA without bond, is Petitioner.  Accounting is waived.  I&A: \$167,200.34 POH: \$48,947.55  Administrator (Statutory): Waived  Attorney (Statutory): \$5,251.01  Closing: \$500.00  Distribution pursuant to intestate succession:  Joan E. Nakamura: \$14,698.84 Stanley M. Yomogida: \$14,398.85 Lynne Kyoko Wareham: \$14,398.85	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
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		<b>Reviewed by:</b> skc <b>Reviewed on:</b> 1-28-15 <b>Updates:</b> <b>Recommendation:</b> SUBMITTED <b>File</b> 6 - Yomogida	



Atty      Jaech, Jeffrey A., of Baker Manock & Jensen (for Petitioner Gregory Hinckley, Successor Trustee)

Petition to Establish Claim of Ownership in Favor of Trust, for an Order Directing Respondent to Return Trust Assets and for Damages under Probate Code 859; or for Instructions, if Return of the Assets is not Ordered to Charge Respondents share for the Value of the Unreturned Assets [Probate Code §§ 850(a)(3)(B); 17200]

<b>DOD: 4/26/2014</b>	<b>GREGORY HINCKLEY</b> , son and Successor Trustee of the <b>JOSEPHINE F. HINCKLEY FAMILY TRUST</b> , is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from 120114</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
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<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
			<b>OFF CALENDAR</b> Per Request for Dismissal entered 1/28/2015
			<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 1/28/15	
		<b>Updates:</b>	
		<b>Recommendation</b>	
		<b>File 8 - Hinckley</b>	

## Spousal or Domestic Partner Property Petition (Prob. C. 13650)

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
Cont. from		
Aff.Sub.Wit.		
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Inventory		
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Notice of Hrg		
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Duties/Supp		
Objections		
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CI Report		<b>CONTINUED TO 2-19-15</b> Per Attorney requeste
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		Reviewed by: skc Reviewed on: 1-28-15 Updates: Recommendation: File 10 - Bone

<b>DOD: 11-18-14</b>  <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;"></td><td style="width: 80%;"><b>Aff.Sub.Wit.</b></td><td style="width: 10%;"></td></tr> <tr><td>✓</td><td><b>Verified</b></td><td></td></tr> <tr><td></td><td><b>Inventory</b></td><td></td></tr> <tr><td></td><td><b>PTC</b></td><td></td></tr> <tr><td></td><td><b>Not.Cred.</b></td><td></td></tr> <tr><td>✓</td><td><b>Notice of Hrg</b></td><td></td></tr> <tr><td>✓</td><td><b>Aff.Mail</b></td><td style="text-align: center;">w</td></tr> <tr><td>✓</td><td><b>Aff.Pub.</b></td><td></td></tr> <tr><td></td><td><b>Sp.Ntc.</b></td><td></td></tr> <tr><td></td><td><b>Pers.Serv.</b></td><td></td></tr> <tr><td></td><td><b>Conf. Screen</b></td><td></td></tr> <tr><td>✓</td><td><b>Letters</b></td><td></td></tr> <tr><td>✓</td><td><b>Duties/Supp</b></td><td></td></tr> <tr><td></td><td><b>Objections</b></td><td></td></tr> <tr><td></td><td><b>Video Receipt</b></td><td></td></tr> <tr><td></td><td><b>CI Report</b></td><td></td></tr> <tr><td></td><td><b>9202</b></td><td></td></tr> <tr><td>✓</td><td><b>Order</b></td><td></td></tr> <tr><td></td><td><b>Aff. Posting</b></td><td></td></tr> <tr><td></td><td><b>Status Rpt</b></td><td></td></tr> <tr><td></td><td><b>UCCJEA</b></td><td></td></tr> <tr><td></td><td><b>Citation</b></td><td></td></tr> <tr><td></td><td><b>FTB Notice</b></td><td></td></tr> </table>		<b>Aff.Sub.Wit.</b>		✓	<b>Verified</b>			<b>Inventory</b>			<b>PTC</b>			<b>Not.Cred.</b>		✓	<b>Notice of Hrg</b>		✓	<b>Aff.Mail</b>	w	✓	<b>Aff.Pub.</b>			<b>Sp.Ntc.</b>			<b>Pers.Serv.</b>			<b>Conf. Screen</b>		✓	<b>Letters</b>		✓	<b>Duties/Supp</b>			<b>Objections</b>			<b>Video Receipt</b>			<b>CI Report</b>			<b>9202</b>		✓	<b>Order</b>			<b>Aff. Posting</b>			<b>Status Rpt</b>			<b>UCCJEA</b>			<b>Citation</b>			<b>FTB Notice</b>		<b>KENT MATSUZAKI and KATHY SANTANA</b> , named Executors without bond, are Petitioners.  Full IAEA – ok  Will dated 3-1-05 Codicil dated 6-4-09  Estimated value of estate: Personal property: \$112,000.00 Annual income: Unknown Real property: \$15,000.00  Probate Referee: Rick Smith	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> The Court will set status hearings as follows:  <ul style="list-style-type: none"> <li>Tuesday, June 9, 2015 for the filing of the Inventory and Appraisal</li> <li>Tuesday, June 7, 2016 for the filing of the first account or petition for final distribution.</li> </ul> <p>If the proper items are on file prior to the status hearing dates pursuant to local rules, the status hearings may be taken off calendar. Otherwise, verified written status report and appearance is required pursuant to local rules.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td><b>Reviewed by:</b> skc</td></tr> <tr><td><b>Reviewed on:</b> 1-28-15</td></tr> <tr><td><b>Updates:</b></td></tr> <tr><td><b>Recommendation:</b> SUBMITTED</td></tr> <tr><td><b>File 11 - Fujisawa</b></td></tr> </table>	<b>Reviewed by:</b> skc	<b>Reviewed on:</b> 1-28-15	<b>Updates:</b>	<b>Recommendation:</b> SUBMITTED	<b>File 11 - Fujisawa</b>
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	<b>UCCJEA</b>																																																																											
	<b>Citation</b>																																																																											
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<b>Reviewed on:</b> 1-28-15																																																																												
<b>Updates:</b>																																																																												
<b>Recommendation:</b> SUBMITTED																																																																												
<b>File 11 - Fujisawa</b>																																																																												



Status Hearing Re: Filing of the Petition for Final Distribution

<b>DOD: 02/24/2012</b>		<p><b>KENNETH ROBERTS</b>, was appointed Administrator with full IAEA and with bond set at <b>\$20,000.00</b> on 10/18/2012.</p> <p><b>Proof of Bond</b> was filed 2/22/2013 showing bond posted in the sum of <b>\$20,000.00</b>.</p> <p><b>Letters issued on 03/14/2013.</b></p> <p><b>Final Inventory and Appraisal</b> filed on 10/15/2013 shows an estate valued at <b>\$129,764.97</b>.</p> <p><b>Minute Order of 10/18/2012</b> set this matter for hearing on 12/20/2013 for status of filing for final distribution.</p> <p><b>Minute Order dated 12/20/2013</b> [Judge Snauffer] states: No appearances. Matter continued to 1/2/2014. The Court orders Larry Donaldson to be personally present on <u>1/2/2014</u>.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 12/16/2014 (Judge Cardoza):</b> Counsel's request for continuance is granted. Counsel is ordered to file a status report before the next hearing if the first account and petition for final distribution has not been filed.</p> <p><b>Minute Order 10/21/2014:</b> No appearances. The matter is continued to 12/16/2014. Attorney Larry Donaldson and Kenneth Roberts are ordered to be personally present on 12/16/2014. The Court orders that a status report be submitted before the next hearing.</p> <p><b>Minute Order dated 10/21/2014</b> was mailed to Attorney Donaldson and Kenneth Roberts on 10/24/2014.</p> <p><b>Minute Order of 04/30/2014:</b> Counsel advises the Court that he now has all the paperwork needed to file the required documents.</p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 122013, 010214, 031314, 043014, 060414, 071614, 090214, 102114, 121614			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
✓ Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<b>Reviewed by:</b> LV	
		<b>Reviewed on:</b> 01/30/2015	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 13– Roberts</b>	



Probate Status Hearing RE: Filing of Petition to Terminate

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		<p><b><u>OFF CALENDAR</u></b></p> <p>Petition for Termination filed 1-22-15          is set for hearing on 2-26-15</p>
		Reviewed by:
		Reviewed on:
		Updates:
		Recommendation:
		File 14 - Siek

Probate Status Hearing RE: Filing of Petition to Terminate

	<p><b>KEITH D'AMBROSIO</b>, Cousin, was appointed Conservator of the Person and Estate with a bond amount to be determined on 7-30-14. Letters issued on 8-1-14.</p> <p>A status hearing regarding determination and filing of bond and inventory and appraisal was held on 12-9-14.</p> <p>Minute Order 12-9-14 states: Mr. Teixeira will file a petition to terminate. If said petition is filed by 1-30-15, then no appearance is necessary on 2-3-15.</p> <p><b>See Declaration of J. Stanley Teixeira filed 1-20-15.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 1-28-15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15 – Farris</b></p>		

Atty Shepard, Jeff S. (for Executor Dennis A. Turmon)

## Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 6/13/2014</b>	<b>DENNIS A. TURMON</b> , son, was appointed Executor with Full IAEA authority with bond 11/13/2014.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Note:</b> This Status Hearing will be continued to the following date:
<b>Cont. from</b>	<b>Proof of Bond</b> was filed on 11/18/2014.	<ul style="list-style-type: none"> <li><b>Monday, April 20, 2015 at 9:00 a.m. in Dept. 303</b> for filing the final inventory and appraisal.</li> </ul>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	<b>Letters issued</b> on 11/18/2014.	<p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required.</p>
<b>Inventory</b>		
<b>PTC</b>	<b>Pursuant to Probate Code § 8800(b)</b> , <i>Final Inventory and Appraisal</i> is due <b>3/18/2015</b> .	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Minute Order dated 10/21/2014</b> from the hearing on the petition for probate set the matter for a Status Hearing on 2/3/2015 for filing of the final inventory and appraisal.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 1/28/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 16 - Turman</b>
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

## Petition for Visitation

See petition and objection for details.			NEEDS/PROBLEMS/COMMENTS:
			<b>Note:</b> Petitioner also filed a Petition for Termination of Guardianship that is set for hearing on 3-4-15.
			1. Need Notice of Hearing.
			2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on:
			- Johnny Clifford Burt (Guardian)
			- Kimberly Athans (Guardian)
			3. The Court may also require notice to the fathers and paternal grandparents.
			Reviewed by: skc
			Reviewed on: 1-28-15
			Updates:
			Recommendation:
			File 17 – Burt & Sorrells

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	x
	Aff.Mail	x
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/>	Aff.Sub.Wit.	
<input checked="" type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input checked="" type="checkbox"/>	Notice of Hrg	
<input checked="" type="checkbox"/>	Aff.Mail	w/o
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input checked="" type="checkbox"/>	Pers.Serv.	w
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	x
<input type="checkbox"/>	9202	
<input checked="" type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 1-28-15
		Updates:
		Recommendation:
		File 18 – Fernandez

Pro Per Keithley, Patricia; Guthrie, Bill;; Guthrie, Randy, Earline Beem; Mobly, Linda;  
Branson, Debbie (Pro Per Petitioners)

## Petition to Determine Succession to Real Property (Prob. C. 13151)

<b>DOD: 5/9/2014</b>		<b>PATRICIA KEITHLEY, BILL GUTHRIE, RANDY GUTHRIE, EARLENE BEEM, LINDA MOBLY, and DEBBIE BRANSON,</b> children, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>		40 days since DOD.	1. <b>Need corrected <i>Final Inventory and Appraisal</i> to be filed with the Court.</b> <i>Final Inventory and Appraisal</i> filed 7/24/2014 is altered with correction fluid at Line 1, in the space for the personal representative's appraisal amount, with <u>no value listed</u> . Additionally, the inventory lists on <i>Attachment 2</i> , Line 1: "Shoes and clothing (donated to Goodwill);" however, the shoes and clothing were given a value of <b>\$200.00</b> , and the <i>Petition</i> requests and the proposed order finds that the shoes and clothing be <u>distributed and divided</u> between Decedent's four daughters, which conflicts with the statement that those items were <u>donated</u> . Corrected <i>Final Inventory and Appraisal</i> is required to provide the Court with an accurate reflection of the estate assets, as follows:
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		<ul style="list-style-type: none"> <li>No improper alterations (no white-out);</li> <li>Inventory must include all assets to be distributed on the attachments (not donated items);</li> <li>Inventory must include all values on Page 1 at Items 1 and 2 as well as a total value.</li> </ul>
<input type="checkbox"/>	<b>Inventory</b>	X	
<input type="checkbox"/>	<b>PTC</b>		No other proceedings.
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		I & A <b>-[assets and value unclear]</b>
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input type="checkbox"/>	<b>Aff.Pub.</b>		[Decedent died intestate?] – [Decedent left a holographic unwitnessed Will dated 6/3/2011.]
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		<b>Petitioners request</b> Court determination that Decedent's <b>100%</b> interest in real property located on Auberry Road in Clovis, and Decedent's <b>100%</b> interest in specified items of personal property <i>[specific items of property are improperly designated as to specified Petitioners]</i> , passes to the Petitioners pursuant to intestate succession.
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		<b>~Please see additional page~</b> <b>Reviewed by:</b> LEG <b>Reviewed on:</b> 1/29/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 19 – Guthrie</b>
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

NEEDS/PROBLEMS/COMMENTS, continue:

2. Decedent's daughter, **KATHY KINCADE** (DOD 11/18/1997), predeceased the Decedent and left issue, **RYAN KINCADE**, Decedent's grandson. Pursuant to Probate Code §§ 6402 and 240, the *Amended Petition* must be joined by **RYAN KINCADE** as an heir entitled to distribution from the Decedent's estate. Need amended petition which includes the verified signature of RYAN KINCADE as a Petitioner in the instant petition to determine succession pursuant to Probate Code § 13151 requiring that the petition must be joined by all those who succeed to the property by intestate succession.
3. Decedent left a Will, as indicated by the initial *Petition to Determine Succession* filed 7/2/2014, which included a copy and a typewritten version of Decedent's Will as required. Probate Code §§ 13151 and 13152 appear to require Petitioners to request that the Court make a determination as to the validity of Decedent's unwitnessed, holographic Will, before proceeding as if the Decedent died intestate.
4. *Attachment 9(a)* to the proposed order distributes the personal property according to the Decedent's Will, which is improper distribution if the instant Amended Petition is proceeding as if the Decedent died intestate. Probate Code § 13152(c) provides: "If the petitioner bases his or her claim to the described property upon the will of the decedent, a copy of the will shall be attached to the petition." This provision appears to allow the Petitioners the option of requesting the distribution of real property under intestate succession because the Will is not the basis upon which the Petitioners base their claims to the estate real property. Here, the Will is silent as to real property, and the Petitioners seek not to use the Will as the basis of their claims to the real property, yet they seek distribution of personal property pursuant to the terms of the Will by including *Attachment 9(a)*, which follows the distribution stated in the Will of *specific items of property designated as to specified Petitioners*. Need clarification of the Petitioners' request for distribution.
5. Need revised proposed order.

## Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			<b>Temporary Expires 2/3/15</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from 120914</b>						
	<b>Aff.Sub.Wit.</b>					
✓	<b>Verified</b>					
	<b>Inventory</b>					
	<b>PTC</b>					
	<b>Not.Cred.</b>					
✓	<b>Notice of Hrg</b>					
✓	<b>Aff.Mail</b>	W/				
	<b>Aff.Pub.</b>					
	<b>Sp.Ntc.</b>					
✓	<b>Pers.Serv.</b>	W/				
✓	<b>Conf. Screen</b>					
✓	<b>Letters</b>					
✓	<b>Duties/Supp</b>					
	<b>Objections</b>					
	<b>Video Receipt</b>					
✓	<b>CI Report</b>					
	<b>9202</b>					
✓	<b>Order</b>					
	<b>Aff. Posting</b>					
	<b>Status Rpt</b>					
✓	<b>UCCJEA</b>					
	<b>Citation</b>					
	<b>FTB Notice</b>					

ILDA AGUILAR, maternal grandmother, is petitioner.  
  
 Please see petition for details.  
  
 Court Investigator Report filed on 12/2/14.

Continued from 12/9/15. Minute Order states Sumila Iniguez is sworn to interpret the Spanish language. Matter is continued for service of the paternal grandfather. As of 1/30/15 the following issues remain:  
  
 1. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice on:  
     a. Arturo Garza (paternal grandfather) – if court does not dispense with notice.

<b>Reviewed by: KT</b>
<b>Reviewed on: 1/30/15</b>
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 20 - Garza</b>



**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

			See petition for details	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Petitioner did not file the Declaration under UCCJEA (Form GC-120). This form provides residence history and includes information pursuant to Probate Code §1510 (other cases involving the minors, etc.).
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg	x		
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	Clearances			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA	x		
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1-29-15	
			Updates:	
			Recommendation:	
			File 21 – Emerson	

Pro Per Gonzales, Lidia (Pro Per Petitioner, mother)

## Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

		<b>LIDIA GONZALES</b> , mother, is Petitioner and requests appointment as Conservator of the Person with medical consent powers.  <p align="center"><i>~Please see Petition for details~</i></p> <p><b>Court Investigator Report was filed on 1/14/2015.</b></p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Court Investigator Advised Rights on 1/6/2015.</b>  <b>Voting Rights Affected – Need Minute Order.</b>  1. Need Citation for Conservatorship pursuant to Probate Code § 1823, and proof of personal service of the Citation on the proposed Conservatee with a copy of the <i>Petition for Appointment of Probate Conservator</i> pursuant to Probate Code § 1824. (Note: Proof of Personal Service of Notice of Hearing filed 1/14/2015 is insufficient to satisfy this requirement and does not indicate the name of the person served or the time of service.)  2. Item 11 of the Petition is incomplete as it does not list the proposed Conservatee's relatives. Need the names and residence addresses of the proposed Conservatee's parents, grandparents, brothers and sisters.  <p align="center"><i>~Please see additional page~</i></p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation	X		
	FTB Notice			

<b>Reviewed by:</b> LEG
<b>Reviewed on:</b> 1/29/15
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 22 - Torres</b>

**NEEDS/PROBLEMS/COMMENTS, continued:**

3. Need *Notice of Hearing* and proof of service by mail of the notice with a copy of the *Petition* showing notice was mailed at least 15 days before the hearing pursuant to Probate Code § 1822 for all of the relatives of the proposed Conservatee.
4. Need proof of mailed service of the *Notice of Hearing* with a copy of the *Petition for Appointment of Probate Conservator*, showing service was mailed at least 30 days before the hearing, for the regional center, **CENTRAL VALLEY REGIONAL CENTER (CVRC)**, pursuant to Probate Code § 1822(e).
5. Item 5 of the *Confidential Conservator Screening* form filed 12/22/2014 is incomplete regarding registered domestic partner; Item 19 is incomplete regarding corporate officer; and Item 20 is incomplete regarding social worker, parole, or probation officer.

Pro Per Viney, Evelyn M. (Pro Per Petitioner, paternal aunt)

## Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

		<u>General Hearing set for 3/23/2015</u>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. <b>UCCJEA form filed on 1/12/2015 does not provide residence information for the last 5 years as required (form provides information back to January 2012.)</b>
		EVELYN M. VINEY, paternal aunt, is Petitioner.	
Cont. from		<u>~Please see Petition for details~</u>	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 1/29/15
			Updates:
			Recommendation:
			File 23 - Thomas

	See petition for details	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
N/A	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: skc
		Reviewed on: 1-29-15
		Updates:
		Recommendation:
		File 24 - Cruz

## **Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)**

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	X	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 1-29-15
			Updates:
			Recommendation:
			File 25 - Packard